
October 2002 - Issue 9-Special Annual Meeting Issue

Sneak peek at what's in this issue:

- + [33rd Annual Meeting of NCSSMA](#)
 - [Day One - Tuesday, October 8](#)
 - [Day Two - Wednesday, October 9](#)
 - [Day Three - Thursday, October 10](#)
- + [Lessons from Denver - My First Annual Meeting](#)

This is a special Annual Meeting edition of FrontLine. Our normal features, such as the President's Message and Editor's Corner, will return in the next edition. Very special thanks are due to Rick Warsinskey, District Manager, Cleveland DTN, Ohio, for serving as reporter for this edition.

Phil Walton, Editor



Rick Warsinskey

**33rd Annual Meeting- Denver, Colorado
October 8-10, 2002
"Rising to the Challenge in Mile High Denver"**

By Rick Warsinskey

The detailed annual meeting minutes prepared by the NCSSMA Secretary, Nancy Cornell, will be shared through e-mail with the members. This report is intended to give a condensed report of the annual meeting.

Day One

Tony Pezza, NCSSMA President, opened the meeting with a moment of remembrance for September 11 and then led the pledge of allegiance. Bob Barth, Denver Region President, welcomed the delegates and guests to Denver and introduced the Denver Regional Commissioner, James Everett. Mr. Everett rounded out his welcome with an overview of the history of Denver as well as a review of its current attractions.



Commissioner Barnhart

Tony Pezza then introduced Commissioner Jo Anne Barnhart. Ms. Barnhart spoke about the challenges we face in SSA: the four S's, Solvency, Staffing, Stewardship and Service. She said that after the election she hoped we might be able to have a more open debate and discussion on Social Security's solvency. Ms. Barnhart acknowledged the strain on our staffs due to tight resources. She stated we need to bring in new people with the looming retirement wave and loss of tremendous expertise so our new hires will be able to take the place of our experienced workforce. She said we need to restore in America the image that public service is something that is vital to the future of our country.

The commissioner stated that we have to continue to improve the stewardship of our programs. She highlighted the efforts to improve enumeration for social security numbers. She would like to get SSI off the list of high-risk programs and is working to do so. She did note we have made slight improvement in our SSI quality.

Ms. Barnhart said our public service is great but we **have** to do better. She believes we will do better. She complimented us on our professionalism.

The commissioner then moved to the service delivery budget. As commissioner she looks at things differently than she did as a member of the Social Security Advisory Board. She recognizes the political realities of the day but stated we will not promise to do things that we simply cannot do or that do not make sense. There has to be a return on investment. She was pleased that SSA received a 5% increase in our budget last year compared to the cuts in many government agencies.

The commissioner wants to really look at what our job is in this agency. The service delivery budget looks at what resources we need for work coming in the door, what it would take to have special workloads such as SDW being worked down in 3 years, working down all backlogs in the agency including PSC workloads, and other projects such as e-Dib. This was all totaled up for five years with a 2% productivity increase each year, which she stated was conservative. This document really tells

the story but hasn't been released yet. It lays out what our Agency can realistically do.

Ms. Barnhart discussed our Agency challenge to improve our disability process and the many delays throughout the process. Only 7 days out of 1,053 days for a disability case going to a hearing are days that cases are actually worked on. She stated these numbers demand we do something to improve this process. The commissioner spoke about her meeting with President Bush and his concern that we improve the processing delays in the Disability program. E-Dib is a top priority of SSA.



President Tony Pezza

The commissioner understands how important SUMS is to us. She recognizes that we have to improve our collection of information so we can manage our workloads better.

The commissioner acknowledged the complexity of SDW cases and has personally looked at examples of cases. She stated that many of the quality problems with SDW are technical errors, not significant errors.



DCHR Reginald Wells

Ms. Barnhart stated she knows how interested we are in improving quality and that a lot of lip service is given to quality. She wants our agency to move beyond lip service. She wants our efforts to be real and our approach to be practical, not theoretical. She stated there would be many steps or phases to improving quality. We may be years away from real progress in improving our quality.

The commissioner stated SSA's "can do" effort to reduce the management-staff ratio has resulted in a disservice. She wishes she could wave a magic wand and fix this problem but it isn't that simple and she doesn't want to make promises in this area that she can't keep. She is aware of this issue and is looking at it.

Ms. Barnhart is proud of the improvements in the suggestion process and there has been a great increase in the number of suggestions. She appreciates our support in improving the process.

Training is an area the commissioner hears many concerns about, especially IVT training. She likes people to people contact. Unfortunately the world has changed and video training is much cheaper. Younger employees seem to readily adapt to this method of training. But there will continue to be efforts to look at where it would make more sense to do live training. She is very impressed with the Automation Training Specialist (ATS) initiative in the Dallas Region and their productivity gains.

The commissioner closed by discussing her personal management philosophy. She stated her strong support for Linda McMahon and her abilities to run Operations. She said the

best managers don't focus on promoting themselves but the successes of everyone. We all need to join in the work and work together, not be self-promoters. Praise others and help bring out the best in others and forget about ourselves. To lead is to work together. Know yourself. Take time to look at your strengths and weaknesses and what you can do to help those around you make a better team. Find out what others can do best and take advantage of this. Take time to say thank you. Don't get so caught up with our day to forget to say thank you to all those who work around you.

Show respect for our peers. We are all in this together no matter if our styles are different. Be Principled. If you make decisions grounded in principle you will be proud of it. Don't ask someone to do something you wouldn't do yourself. Treat all people professionally. Set the bar to challenge people. Always be honest but diplomatic. Have a vision and communicate it. You don't have to come up with all the answers as your team around you can help you make the right decisions.

The commissioner wants people to feel free to express their views. Perception is reality. We work for the people. People are the most important resource we have. Always remember that and treat people right. Everyone in our agency matters. Every member of the public matters. The commissioner stated she loves her job and the dedication of all the employees.

The commissioner added these points as a result of questions asked:

She stated she simply couldn't tell what would happen with the budget but it appears we may have a Continuing Resolution (CR) into March 2003. She stated we do not want to have a back-loading of overtime so we will get more overtime up front than under past CR's.

The commissioner stated the DDS's will be ready to adjust to e-Dib but there will be a phase in process.

The commissioner states she was not big on mandating national policies on how we use our resources. She would not support a mandated use of Generalist CR's. She prefers to give each office the flexibility to set things up that work best for that office.

The commissioner stated she is working to get us more resources. She gave the field 200 more FTE's last year and is trying to move more staff from CO to Operations.

Ms. Barnhart stated that she did not know what would happen with going back to more 'S' or supervisory positions. She said

this is an issue she does not have an answer on now.

Tony Pezza began the business part of the meeting by recognizing past NCSSMA Presidents: Bob Duncan (88-90), Mary Chatel (91-92), Steve Bauer (84-86) and Don Seatter (95-97). The Regional Presidents then seated their delegates. Steve Korn, Immediate Past President, reviewed the rules of the meeting.

Tony Pezza provided a President's update. He stated we have seen a growth in membership. He covered many of the highlights of our past year including meeting with members of Congress, meeting with other organizations such as NADE and NCDDD, reaching out to SSA-FMA with a joint letter on management awards, important position documents on goals, management ratios and the Survey of Management. Tony stated that many of the issues we've raised are moving in a positive direction.

Secretary Nancy Cornell's minutes of last year's meetings were then approved. The Treasurer, Greg Heineman, reviewed the financial status of NCSSMA. He highlighted the growth in membership of 85 members, which has offset the drops in interest rates. There is an eight month reserve on hand which is considered very good for our type of organization.

Dr. Reginald F. Wells, the Deputy Commissioner for Human Resources, then spoke to the delegates. He stated we need to go back and rethink much of what we have done in the past. Dr. Wells stated that he has spoken to many SSA employees who are very positive about our Agency and he found so many are very dedicated to its mission. Many federal agencies want to bench mark what we do and hope to be where we are today. He would like all of us to work more on a personal basis, not impersonal, to address issues.

Dr. Wells stated he recognizes the roadblocks we have in our path due to past agreements with AFGE. Efforts are being made to make a business case to work on contract changes as part of the 2004 SSA-AFGE negotiations. He stated we are negotiating for the American public and for the employees of SSA. A survey of management will be sent out shortly and we are encouraged to complete the survey.

Dr. Wells acknowledged the resource challenges to making available more mentors to work with trainees in IVT classes. Training is going to be a key to our abilities to transition from the loss of our retirees to the future of our new hires so we can best weather the retirement wave. He acknowledges our need to improve IVT training and basic technical training.

Dr. Wells stated that he recognizes how hard it is for us to get

our jobs done with the limited number of line management we have. He will look into a two-year probationary period, due to the challenges of assessing employees in a short one year time period with long basic training classes. Official time is a top issue that will be looked at as part of the 2004 National Contract Negotiations. We still want to work to have good relations with our unions. We will be studying childcare subsidies.

Dr. Wells is not aware of any special incentives to keep employees from retiring. There will be a special research group to look at the business case for performance management issues, including an appraisal system other than pass-fail. The 5% shift of staffing from CO to Operations may be perceived as a token gesture as this is a small number of employees. This is something Operations will need to look more at.

In the afternoon, the meeting reconvened with the presentation of the FY 2003 NCSSMA budget. The proposed budget, which was passed, showed a projected surplus of \$3,424. The audit report was then presented and there was a first reading of the 26 resolutions from the 10 regions and the Staffing Committee. Extensive discussion then followed on the resolutions. This process involved the refinement of resolutions through amendments and editorial changes. Voting on resolutions followed after the discussion of each resolution.

At the end of the day the group heard from representatives of three sponsoring organizations that supported the NCSSMA Annual Meeting: BPI, EAA and the Safeway Rocky Mountain Credit Union in Denver.

Day 2

The meeting started back up with consideration of more resolutions.



DCO Linda McMahon

Linda McMahon, Deputy Commissioner for Operations, spoke to the delegates at mid morning. She spoke about how broad Operations is and that it just isn't the field, so she needs to take a complete look at our operations to ensure we have a good level of service throughout Operations. Ms. McMahon expressed the importance of balance in all parts of our operation, every day of the year. We need to pay attention to who determines our goals so that the resources match our ability to meet goals. There needs to be balance between service and stewardship; service and resources. Linda stated resources are now more balanced between regions. Goals need to be reasonable. Strive to achieve them but not be number 1, otherwise we lose our balance.

Ms. McMahon stated if it is in Operations's best interest to achieve a goal, then Operations needs to take it on. Quality has to be addressed. We need resources for it. We need to train people on automation. More dollars have been budgeted in this area and we will do more automation training.

We need to take a more out of the box approach to basic training. We need to train people on what they really need to know as they proceed through training. Training needs to be available when they actually need it. Mentoring is a huge expense so it needs to be effective. Combining IVT and mentoring in the most effective way is what we really need to analyze.

We need to make sure we find the best possible road to all the ways we deliver service including electronic service. Our goals need to be tied to the integrity of our processes. Inappropriate conduct in processing workloads or in the treatment of staff by management will not be tolerated and will be dealt with. Our jobs are not easy but we are involved in a very noble endeavor. Linda thanked us for all we do.

A question was asked regarding the excessive taking of technical denials and ABAP's. Linda said this issue has been complicated by SDW. At this point we need to look at the value of what we do and continue to analyze this more.

Mrs. McMahon stated that there have been high level meetings to insure SUMS is kept on track. Linda said she would monitor the progress of SUMS very closely. We need to continue to get more field input on SUMS. In FY 2003, there will be more focus on getting SUMS moving. The Customer Service Record will

move forward and be tied to VIP. It is a priority to provide us better CDR management information. Most of the serious work on SUMS will be done in FY 2004 and 2005 due to resources being tied up in FY 2003. It doesn't make sense to push Systems to do things they can't do. We need commitments from all parts of the organization to make SUMS a reality. The time allocation is a key piece of SUMS that has not moved quickly. Engineered times are being looked at including the clustering of times. One of the problems with using engineering time is capturing overhead time.

A question was asked about the closing of the NEN. The closing of the NEN was not the wrong decision and the NEN will not be reinstated in the short term. We have an Operations Intranet Steering Committee that does work and shares information among themselves. They will put together a web page to help share information that will be shared at an appropriate time. Linda is trying to accelerate the implementation of this. Another piece that is being worked on is what information will be shared. PolicyNet will be used to help share this information. We need to teach people how to find the information. Linda did acknowledge the contributions of Rick Warsinskey in the past years in sharing information through the NEN.



Tony Pezza, Dave Gaca, and Linda McMahon

A question was asked about whether we are still considering the problems of metropolitan offices. Linda replied that the Regional Commissioners need to make their own assessments in each region.

At the conclusion of her remarks Ms. McMahon assisted President Tony Pezza in making the presentation of the NCSSMA Community Service Award. This year's award went to Dave Gaca, DM, Peoria, IL for his extensive community involvement.



Hal Daub

In the afternoon, Hal Daub, Chairman of the Social Security Advisory Board, spoke to the delegates. He talked about his concern about the gap in revenues versus projected expenses for the Social Security Trust fund in the future. He made very clear Congress is not addressing the issue, rather there is too much demagoguery. He said Congress does not show enough interest in the delays in the disability program. If there is a problem, it needs to be dealt with.

Congress has not listened adequately to the reports published by the Advisory Council. The board needs to go the next level. Mr. Daub says he is making house calls with Congress to try to make a difference. There needs to be more attention paid to staffing and resources.

Hal Daub stated that allowing money to be put in the stock market is much better in the long run because there will be a

better return. There are a lot of other Government programs that will be put under stress in the budget, making it harder to cover the Social Security Trust fund gap through general revenues.

The Social Security card needs to be issued at the point of entry for aliens. Issuing Social Security numbers may have the same level of review and documentation as a passport does.

The Board is very much in favor of removing the LAE restrictions SSA is under. Mr. Daub stated that NCSSMA's surveys are very powerful and influential. He said we must continue to use these surveys. He stated that Congress and OMB are persuaded by this information. This is valuable ammunition.



Sara Garland

After Mr. Daub spoke, the Denver Region Management Association gave special awards for their members. Discussion on resolutions continued, followed by the candidates'.

The first was for the candidates for TSC Representative: Kay Rhodes and Rich Rivera. This was followed by the Treasurer: Greg Heineman, Secretary: Nancy Cornell, Vice President: Ginny Lighthizer and President: Tony Pezza. Each spoke briefly and explained why they were asking for the vote of delegates. The President, Tony Pezza, answered specific questions from the delegates.

The day ended with Sara Garland, NCSSMA's Government Relations Consultant, updating us on her efforts to support NCSSMA. Sara stated gridlock in Washington has never been more severe. No appropriations bills are passing. Ms. Garland explained that Congress responds to a crisis much better than a need. So she is optimistic that Congress may do something about the SDW issue. This could mean additional resources for SSA.

Sara also stated that NCSSMA's surveys (Survey of Management and Staffing Survey) have been very effective and are being quoted on the Hill. She explained that there have been challenges in getting Congress's attention on the overtime for supervisors. But she thinks that we may have a better chance of moving legislation on this issue after the election.



Bev Herbst

Our pay raise is still uncertain and depends on what language is in the Continuing Resolution. It is also uncertain what legislation may be passed on the LAE funding. Support is growing on adjusting the law on the impact of windfall offset. Sara complimented Joe Walsh, President of the Atlanta Region Management Association and Grassroots Committee Chair, on his contributions to the Grassroots efforts for the National Council.

Who will capture the House or Senate is pretty unclear.

Republicans currently have the edge to hold the House. The Senate is more of a toss-up. We have friends on both side of the aisle and can work with both sides.

Wednesday Evening. A banquet was held for all attendees and guests. Tony Pezza presented these special awards:

A Special Achievement Award to Rick Warsinskey for his years of service in developing and running the National Exchange Network (NEN)

A plaque to Rudy Macias for his many years of service as the TSC Representative for the National Council

The Joseph Collins Cup, NCSSMA's highest award, to Bev Herbst for her many very devoted years of work on behalf of NCSSMA



Day 3

The meeting started up with the discussion and passing of the remaining resolutions.



Steve Bauer

Steve Bauer, Executive Director of the Federal Employees Education and Assistance Fund (FEEA) spoke to the delegates. Steve stated NCSSMA was one of the founders of FEEA along with two Unions and another Management Association. FEEA is a charity for federal employees that provides assistance to federal employees and their families. He gave a brief history of FEEA and told about many examples of how FEEA had helped employees including for Oklahoma City and September 11. Sixteen children of SSA employees who were killed at Oklahoma City have had scholarships set up as a result of FEEA. FEEA's CFC contribution number is 1234. He stated the overhead for FEEA is only .8%. Steve thanked the National Council for their many years of support to FEEA.



Pezza, Lighthizer, Heineman, and Cornell

Near the end of the meeting the results of the elections of officers was announced:

President, Tony Pezza, District Manager, Hackensack, New Jersey

Vice President, Ginny Lighthizer, District Manager, Detroit East, Michigan

Secretary, Nancy Cornell, District Manager, Arlington, Virginia

Treasurer, Greg Heineman, District Manager, Norfolk, Nebraska

TSC Representative, Richard Rivera, TSC Manager, Golden, Colorado



Randy Lueking, Toni Russo, and Francine Nordman

Already looking ahead to next year, the Dallas Region stated the 2003 Annual Meeting would be in Albuquerque, New Mexico. The Boston Region stated the likely location of the 2004 Annual Meeting would be Providence, Rhode Island.

At the end of the meeting the delegates gave a rousing applause to Toni Russo, Bob Barth, and the Denver Region for all their efforts in organizing the exceptionally well run 2002 NCSSMA Annual Meeting.

Editor's Note – The NCSSMA wishes to thank Rick Warsinskey for this comprehensive report on the Annual Meeting. We'll close this edition of FrontLine with a personal perspective of the annual meeting from one of our members who attended her first such meeting. We want to thank the author, Carla Martin, for allowing us to share her impressions. A recounting of the events of the meeting means much more when we are able to glean personal lessons from the deliberations. Carla's article

does just that.

Lessons From Denver - My First Annual Meeting



Carla Martin

By Carla Martin, OS
Hartford, CT

I thought my hike on the Bear Lake Trail in the Rocky Mountains would be the only Denver experience that would leave me breathless and inspired. Surprisingly, I found the NCSSMA conference left me feeling the same way. The laborious path through the three days of meetings was full of many debates (some passionate) over what issues the organization should focus on in the upcoming year. There were reports of the past year's activities and accomplishments, and informative and thought provoking speakers – Commissioner Barnhart, Deputy Commissioner McMahon, the head of the Social Security Advisory Board, Hal Daub, NCSSMA's Lobbyist, Sara Garland, and the Director of the FEEA, Steve Bauer.

What I take away from the three days is that every member, every employee and every voter does matter. It is not enough to sit on the side of the trail and complain. You have to take a deep breath and keep going. You may need to encourage others; they may need to push you on. Sometimes the steepest and most difficult trails lead to the best views and the greatest sense of accomplishment. Whatever the end result, the camaraderie along the way is a reward in itself.

The experience gave me a chance to view what I do, what we all do, achieve and the challenges we face from a global perspective. It is easy to get caught up in the day-to-day operations of running an individual office and lose sight of the fact that there are many others working alongside you in the PSCs, TSCs and other FOs. It is like looking at the one red maple in your backyard and then viewing the foliage from Bear Mountain – Wow - What a difference in perspective.

It's that difference in perspective that prompts me to encourage everyone to get involved in the organization, regionally and nationally. You can make a difference.

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